

## Changing Contracts in Aspire

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It is common for landscape contracts to change while the contract is being fulfilled. In June 2016, Aspire version 2.5 began to support the ability to update active contracts. Prior to that, it was necessary to essentially end one contract and create a new opportunity. Now Aspire supports revisions that apply to future work on a contract while maintaining the history of work already completed. Aspire allows services to be added to or removed from a contract. Additionally, existing services can be modified to change the number of occurrences or the specific items or kits within a given service.

This article explains the new capability of Aspire that allows you to more easily transition to new contract terms without the need to create a new opportunity.

### Overview

The following steps summarize the process for making changes to an active contract in Aspire:

1. Initiate the contract change
2. Make changes to the contract services (add services, remove services, modify services)
3. Win the contract changes

This cycle may occur multiple times throughout the life of the contract. Note that during any particular change cycle, multiple individual changes can be made to the contract's services. For example, you could add two services, remove one service and modify several item costs associated with another service – all within the context of a single contract change cycle.

Each time you go through this change process for a given contract, a new contract Revision is created. The revision is maintained within the single contract, so the contract continues to be tracked under its original Opportunity Number. The original contract is considered to be revision zero (0) with successive revisions being incrementally numbered (1, 2, etc.). When looking at the estimate for a job that has undergone contract revisions, Aspire allows you to see the revision history for the services on the contract.

In addition to explaining the process for applying contract changes, this article will also explain how this capability impacts other areas within the Aspire software application.

### Permission

Only users who are assigned to an Aspire Role that has the *Change Opportunity* permission<sup>a</sup> enabled will be able to initiate a change to an existing open contract.

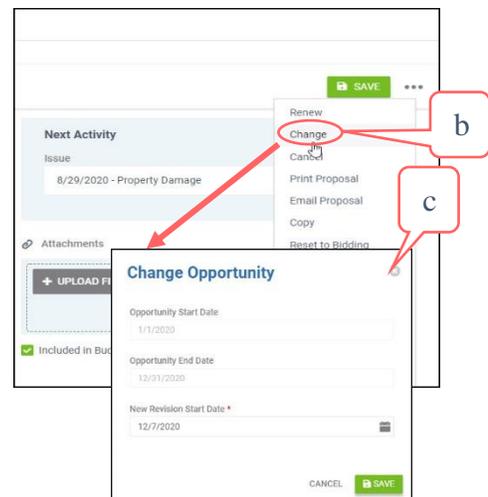
## Conditions Required to Initiate Contract Change

Initiation of a contract change is performed on the *Opportunity* screen within Aspire by selecting the *Change* option in the top menu. The *Change* option is only available under the following conditions:

1. The user who is logged into Aspire has been given the *Change Opportunity* permission.
2. The opportunity has a job status code of *In Process*<sup>1</sup>.
3. The opportunity has no revisions OR the current opportunity revision is still active.

## Initiating a Contract Change

When you select the *Change* option<sup>b</sup> on the *Opportunity* screen for a job that is in process, Aspire displays the *Change Opportunity* dialog<sup>c</sup> that requires you specify a start date for the revision. The specified *New Revision Start Date* must be greater than the latest of the opportunity start date or the *Active Revision Start Date*. (Note that if the example at right had an existing active revision, the *Active Revision Start Date* would also be displayed.) Furthermore, the *New Revision Start Date* must be prior to the *Opportunity End Date*.



To proceed with the contract change, click the Save icon . To cancel the contract change, click the CANCEL icon .

Each successive revision created for a given opportunity is assigned successive revision numbers starting at one (1).

## Pending Revisions

As soon as the Save icon is selected, Aspire creates a contract revision for the opportunity, and sets the *Revision Status* to *Pending*. The *Revision Status* remains in the pending state until the revision is later won or cancelled.

<sup>1</sup> Be aware that each Aspire client may specify an alternate name associated with job status codes. Some Aspire clients, for example, name the status code "In Process", to be "In Production". In these cases, job status in the Opportunity lists would show up as "In Production", rather than "In Process" in the *Opportunity* list.

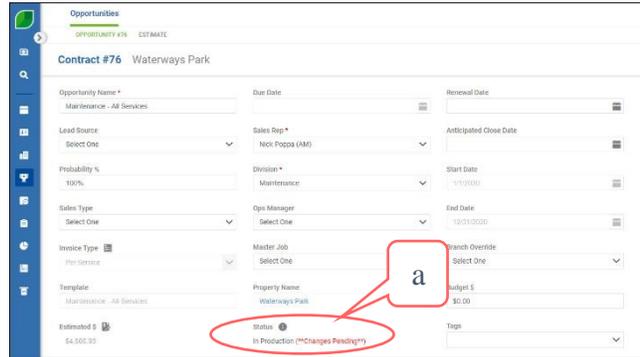
Also upon clicking the Save icon to create the revision, Aspire will display the *Estimate* screen for the opportunity. This makes it convenient for you to make the appropriate price adjustments to the contract. It is not, however, essential that you make price adjustments immediately – you can leave the Estimate screen, and go back later to make the changes.

If you go to the *Opportunity* screen for a contract with a change in the *Pending* status, the words (“*Changes Pending*”) will appear in red next to job status<sup>a</sup>. This makes it easy to identify opportunities for which contract changes are pending.

For contracts that have changes pending, Aspire removes the following options from the bottom menu which are otherwise available on the *Opportunity* screen:

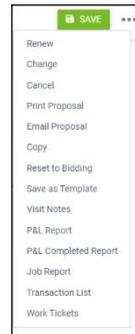
1. Renew
2. Change
3. Cancel
4. Copy
5. Reset to Bidding
6. Save as Template

These options are not appropriate for use while contract changes are pending.

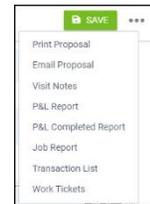


### Opportunity Screen Menu

#### Normal



#### When Changes are Pending

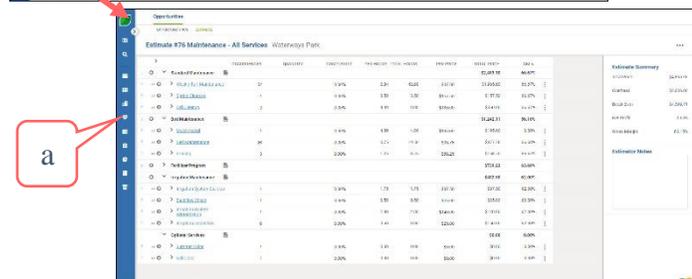
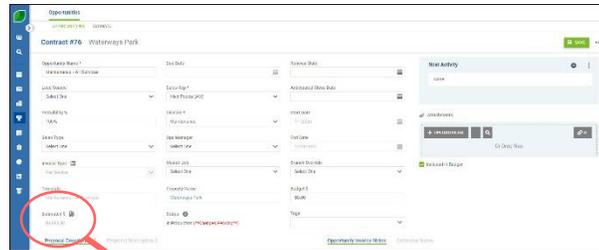


## Making Contract Revisions

When you are ready, you can go back to the *Estimate* screen<sup>a</sup> to make any necessary adjustments to services.

When a revision is in Pending status, you will be able to apply the following updates to the contract:

1. Edit an Active Service
2. Add a New Service
3. Remove an Active Service
4. Changing Optional Services



These updates are described in the subsections that follow. Note that until you Win the revision, you will be able to go back to the Estimates screen to apply additional updates.

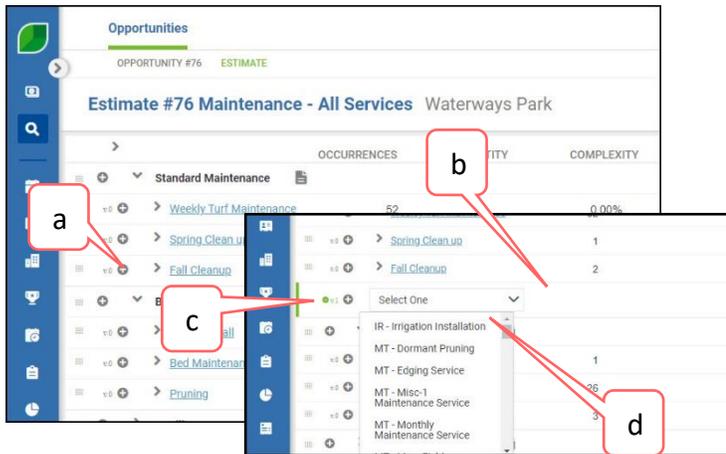
Before proceeding, however, it important to understand that over the period of time during which you are making changes to the contract, Aspire will still allow your company to schedule and complete active tickets associated with the Contract based on the existing contract version rather than the new version whose changes are pending. This period of time can be anywhere from a few minutes to multiple days or even weeks. By the time you are ready to *Win* the changes so that the contract is being executed according to the new rules, tickets may have been completed that you had originally intended to change. Aspire will catch these conditions when you attempt to win the contract, but may not allow you to complete the winning of the contract.

Being aware of these potential conflicts can help you to adjust your business processes accordingly. For example, you can communicate within your organization when a contract is being changed so that work tickets are not being advanced while the change is being updated in Aspire.

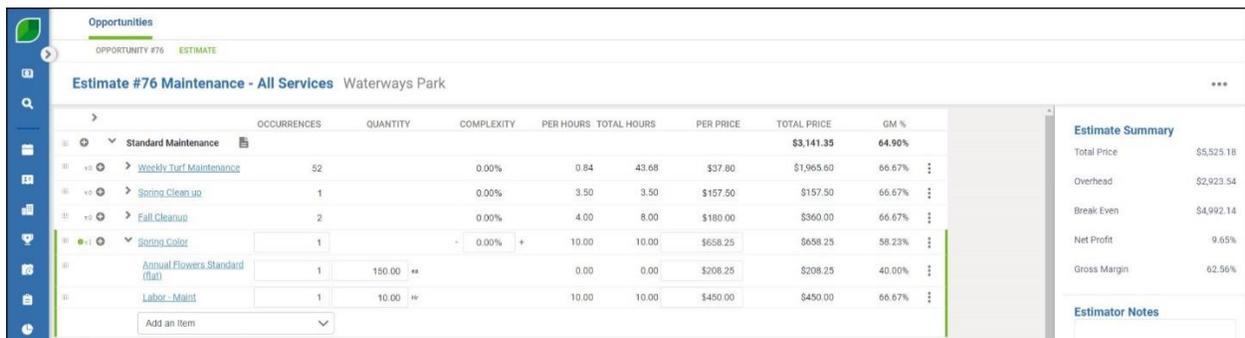
Now let's proceed to explain the types of changes that can be applied to a contract.

### Add a New Service

When the estimate is in pending status, the green + icon will be available to the left of every opportunity service, just like it is when estimating. Clicking the + icon<sup>a</sup> will add a new Service<sup>b</sup> to the estimate and its revision number<sup>c</sup> will be incremented. You may then select a service as you would when you create an estimate for a new opportunity<sup>d</sup>.



Any services added in this manner and the items/kits underneath them are considered “pending” and will be green bars on the left and right sides until the revision has been won as described later.



	OCCURRENCES	QUANTITY	COMPLEXITY	PER HOURS	TOTAL HOURS	PER PRICE	TOTAL PRICE	GM %
Standard Maintenance							\$3,141.35	64.90%
Weekly Turf Maintenance	52		0.00%	0.84	43.68	\$37.80	\$1,965.00	66.67%
Spring Clean up	1		0.00%	3.50	3.50	\$157.50	\$157.50	66.67%
Fall Clean up	2		0.00%	4.00	8.00	\$180.00	\$360.00	66.67%
Spring Color	1		0.00%	10.00	10.00	\$658.25	\$658.25	58.23%
Annual Flowers Standard (flat)	1	150.00		0.00	0.00	\$208.25	\$208.25	40.00%
Labor - Maint	1	10.00		10.00	10.00	\$450.00	\$450.00	66.67%

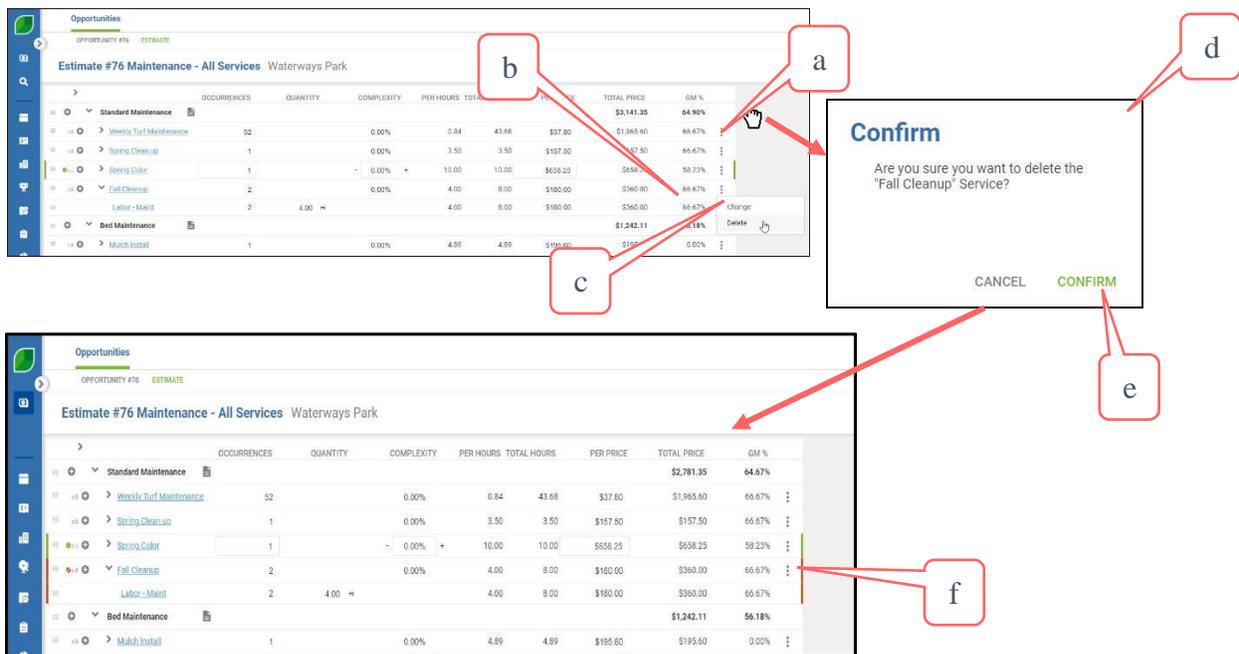
If you remove a service or service item that is still in the pending status (highlighted in green) by clicking the red X to the right of the element, that element is totally removed.

### Remove an Active Service

When the estimate is in pending status the 3 dot menu icon<sup>a</sup> will be available to the right of each active service. Individual items or kits underneath an active service, may not be deleted without deleting the parent service, and thus do not have a 3 dot menu<sup>b</sup>.

To remove an existing active service and all items under it, click the 3 dot menu icon<sup>c</sup>. A small dialog box will pop up allowing you to select change or delete. A confirmation dialog window

will be displayed<sup>d</sup>. Clicking the Confirm<sup>e</sup> in the confirmation dialog window will complete the deletion of the service.



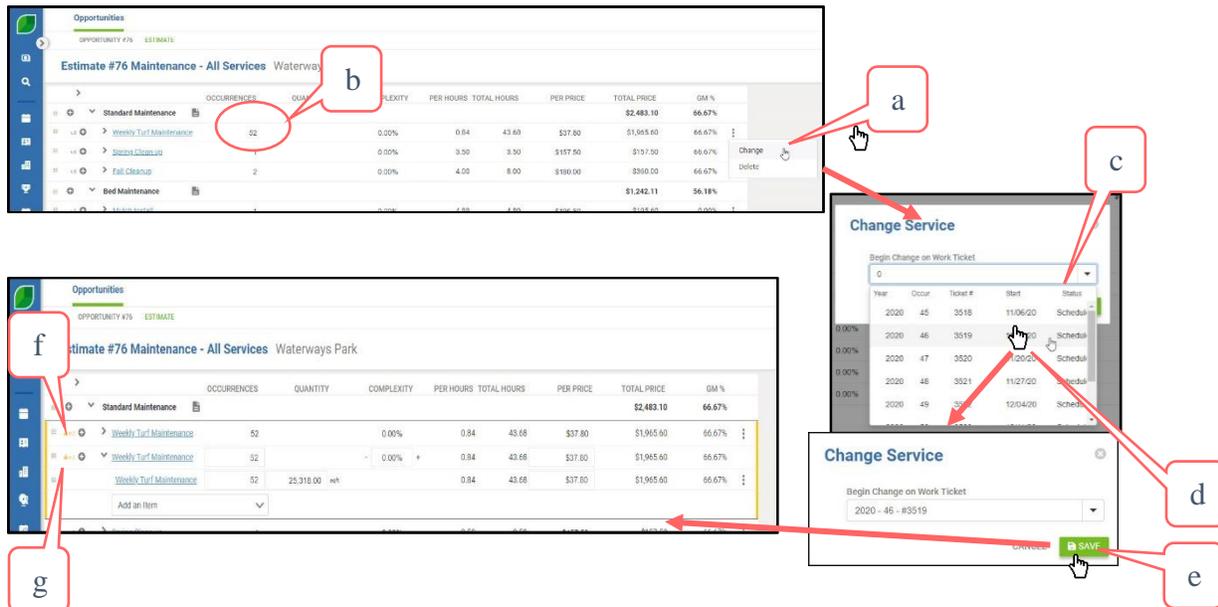
Any services deleted in this manner and the items/kits underneath them are considered “pending” and will be highlighted red bars until the revision has been won as described later. Until the revision has been won, the deletion may be undone by clicking the 3 dot menu icon<sup>f</sup> (⋮) next to the deleted service.

### Edit an Active Service

When the estimate is in pending status, there will be a 3 dot icon (⋮) available to the right of the GM% that will allow users to change an existing service. The service that is being used as an example has fifty-two (52) occurrences of which forty-four have been completed.

Opportunity	Work Ticket	Quantity	Complexity	Per Hours	Total Hours	Per Price	Total Price	GM %	Start Date	End Date
3538	Weekly Turf Maintenance	1	0.84	0.84	43.68	\$37.80	\$1,665.60	66.67%	09/01/2020	09/01/2020
3539	Weekly Turf Maintenance	1	3.50	3.50	3.50	\$157.50	\$157.50	66.67%	09/01/2020	09/04/2020
3540	Weekly Turf Maintenance	1	10.00	10.00	10.00	\$558.25	\$558.25	59.23%	09/01/2020	09/11/2020
3541	Weekly Turf Maintenance	2	4.00	8.00	8.00	\$180.00	\$360.00	66.67%	09/01/2020	09/18/2020
3542	Weekly Turf Maintenance	2	4.00	8.00	8.00	\$180.00	\$360.00	66.67%	09/01/2020	09/25/2020
3543	Weekly Turf Maintenance	1	1.22	1.22	4.0	\$180.00	\$360.00	66.67%	10/01/2020	10/02/2020
3544	Weekly Turf Maintenance	1	1.32	1.32	4.1	\$180.00	\$360.00	66.67%	10/01/2020	10/09/2020
3545	Weekly Turf Maintenance	1	1.35	1.35	4.2	\$180.00	\$360.00	66.67%	10/01/2020	10/16/2020
3546	Weekly Turf Maintenance	1	0.95	0.95	4.3	\$180.00	\$360.00	66.67%	10/01/2020	10/23/2020
3547	Weekly Turf Maintenance	1	1.05	1.05	4.4	\$180.00	\$360.00	66.67%	10/01/2020	10/30/2020
3548	Weekly Turf Maintenance	1	0.30	0.30	4.5	\$180.00	\$360.00	66.67%	11/03/2020	11/04/2020
3549	Weekly Turf Maintenance	1	0.30	0.30	4.6	\$180.00	\$360.00	66.67%	11/03/2020	11/10/2020
3520	Weekly Turf Maintenance	1	0.90	0.90	4.7	\$180.00	\$360.00	66.67%	11/01/2020	11/08/2020

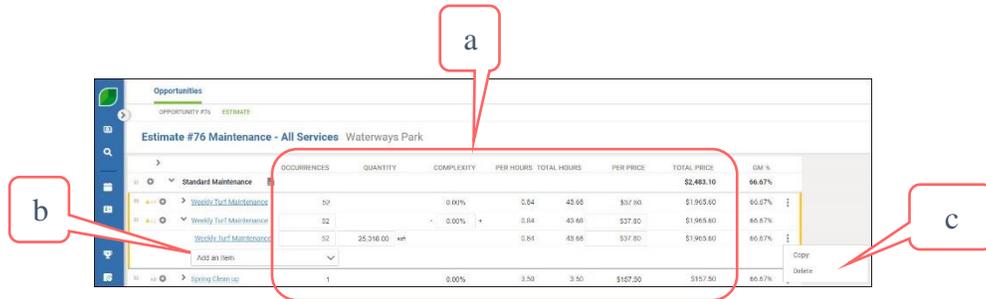
When the change icon<sup>a</sup> is clicked for a multi-occurrence service<sup>b</sup>, Aspire will prompt the user to select the ticket on which the change begins by giving the user a dropdown list<sup>c</sup> of tickets that are in an Open or Scheduled status. If there are no tickets in the list from which to choose, an error message will be displayed.



You may select any ticket in the list<sup>d</sup>, and changes you specify will be applied to that ticket and all that follow it in the list. In this example, where ticket occurrence #46 is selected, occurrence #45 will be left alone, and occurrences from #46 forward will be changed later when the revision is won.

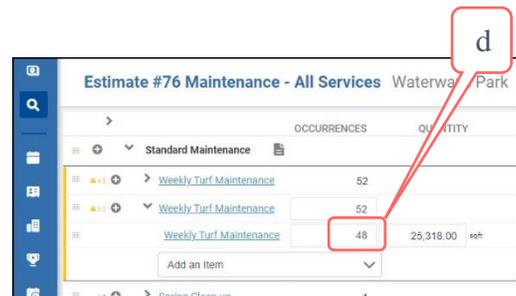
Once you have selected the appropriate ticket occurrence, click the Save icon<sup>e</sup>. At this point, the changes service will be shown with yellow ends. Two versions of the service will be represented – the one that maintains ticket instances prior to the change (v.0)<sup>f</sup>, and the one that maintains ticket instances going forward (v.1)<sup>g</sup>.

At this point, you may modify the individual fields for the new version of the service or its underlying items<sup>a</sup>. You may also add<sup>b</sup> or remove<sup>c</sup> items as you can for an initial estimate.



### IMPORTANT NOTES

1. If you reduce the number of occurrences for a service<sup>d</sup>, then when you win the changes, Aspire will cancel the necessary number of open or scheduled tickets to bring the total annual occurrences in line with the new number of occurrences. In this case, you must ensure that there are a sufficient number of open or scheduled tickets for Aspire to cancel, otherwise you will receive an error when you try to win the changes.



2. Aspire recommends that you avoid changing the number of service occurrences using the Change Contract capability of the Aspire software. If it is necessary to change the number of occurrences, it is recommended that you cancel the original contract and create a new contract to replace it.

While the changes to the service are in *Pending* status (highlighted in yellow), clicking the *Undo* button on the 3dot icon (⋮) will allow you remove all changes from the service. Note also that you cannot delete a service with pending changes. If you decide that you wish to delete the service, you will first have to undo the changes.

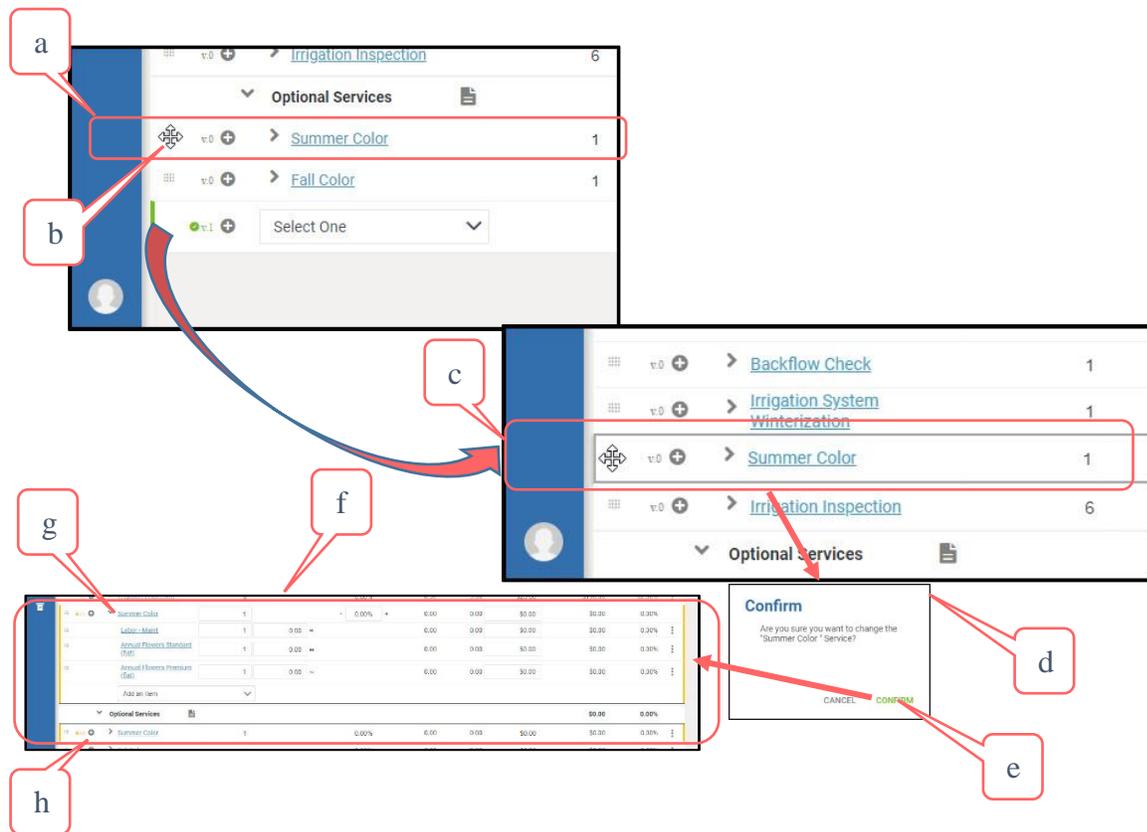
### Changing Optional Services

While changes are pending for a job, Aspire allows you to change active services into optional services, or vice versa. When you change an optional service into an active service, Aspire creates the new active service in the same manner that it creates new services that you add during a change assigning it a new revision number.

When you change an active service into an optional service, Aspire deletes the originally existing active service in the same manner as when you delete other services as described

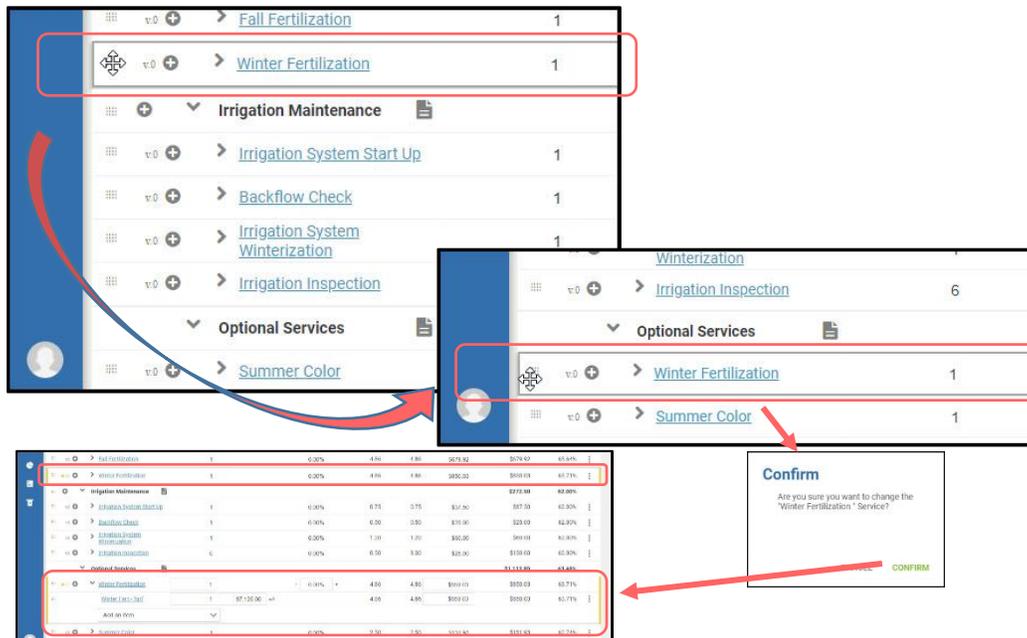
above. Aspire shows it as a deleted revision. It then establishes a new optional service with a new revision number.

An example will clarify. To change the *Summer Color* optional service<sup>a</sup> to an active service, place the mouse cursor over the symbol (☰) to the left of the version number. The cursor will display as four arrows pointing outward<sup>b</sup>. Click down on the left mouse button and hold it – then while holding, drag the *Summer Color* optional service up into the area with the other active services<sup>c</sup>. When you drop to service by releasing the mouse button, a confirmation dialog will display<sup>d</sup>. Upon confirming the dialog by clicking the Confirm icon<sup>e</sup>, the change will be reflected in the *Estimate* screen<sup>f</sup>.



Note that the service is split in two with the original optional service displayed in the *Optional Service* section<sup>h</sup>, and the active service displayed up with the other active services<sup>g</sup>.

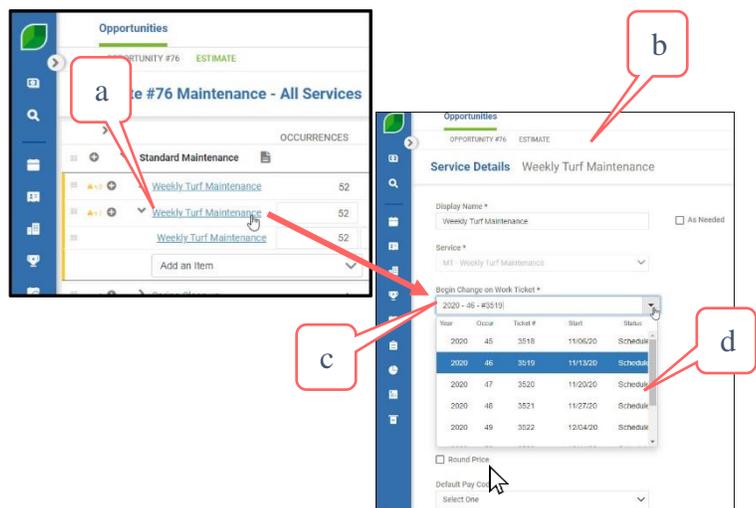
Similarly, active services can be changed into optional services by moving the active service down to the *Optional Service* area as shown here...



### Change Starting Ticket for Service Revision

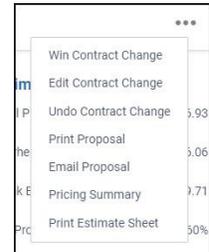
While the changes to the contract are still pending (have not been won), you may determine that you specified the wrong starting ticket for which the changes should be applied. The starting ticket can be changed as follows.

On the estimate screen, click on the service<sup>a</sup> to display the Service Detail screen<sup>b</sup>. The *Begin Change on Work Ticket* field shows the ticket instance you selected when you initiated the change<sup>c</sup>. Select from the drop-down the new ticket<sup>d</sup> on which changes should begin. Click the *Save* icon in the top right corner.



## Additional Pending Estimate Options

While a job is in a *Pending* status (prior to winning the changes), Aspire adjusts the menu options available at the top right of the *Estimate* screen. The following options are added to the menu:

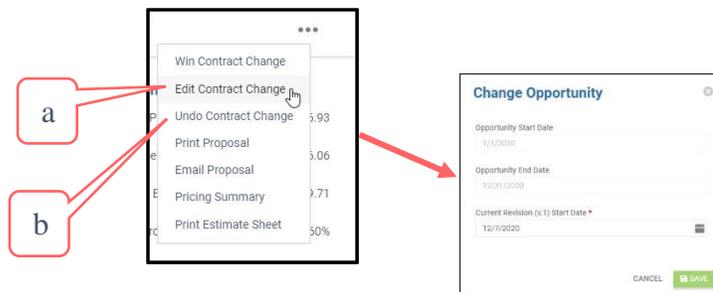


1. Edit Contract Change
2. Undo Contract Change
3. Win Contract Change

Each of these options are explained in the following subsections.

### **Edit Contract Change**

The *Edit Contract Change* option<sup>a</sup> in the bottom menu of the *Estimate* screen will open up the same *Change Opportunity* dialog used to initiate the change so that you can update the revision start date.



### **Undo Contract Change**

The *Undo Contract Change* option<sup>b</sup> in the bottom menu of the *Estimate* screen will remove all pending service additions, deletions or changes from the contract and remove the contract from *Change Pending* status.

### **Win Contract Change**

The *Win Contract Change* option will lock in all changes applied to the contract. When you select this option, but before changes are applied, Aspire will check a couple conditions:

1. It will verify that there are a sufficient number of open or scheduled tickets for Aspire to cancel – otherwise you will receive an error when you try to win the changes. (See the “IMPORTANT NOTE” in the section entitled *Edit an Active Service*, above)
2. If there was a price change, for the service, Aspire will verify that all tickets following the selected starting ticket for the change are in either an *Open* or *Scheduled* status.
3. For all tickets that for which changes are pending must still be in the *Open* or *Scheduled* status. Tickets may have been completed or cancelled while the changes to the contract were pending. (For additional information, see the section entitled *Making Contract Revisions*)

If either of these conditions are not met, Aspire will display an error message, and will not apply the changes. Aspire will not allow you to apply the changes until you have corrected the error

condition. If validation passes and the opportunity is *Fixed Payment* invoice type, Aspire requires you to update and save the payment schedule to Win the change. (See “Payment Schedule for Changed Contracts”, on page 14)

Aspire will create, update or cancel tickets associated with that contract as appropriate based on changes that you have applied as listed below:

1. **Removed Services** – For services that you removed or for services that were changed from active to optional, Aspire will cancel any tickets that are in the *Open* or *Scheduled* status and have no Time/Materials reported. Aspire will also set the service status of removed services to *Inactive*. In the Estimate screen after the change has been won, Aspire will continue to display inactive services, but they will be grayed out<sup>a</sup>.
2. **Added Services** – For services that you added to the contract, Aspire will generate new tickets as if the contract had just been won. They will be displayed with the new version number<sup>b</sup>.
3. **Updated Services** – For updated services, Aspire will move any tickets that are in the *Open* or *Scheduled* status starting with the one that you specified to the new version. The prior version will be shown as crossed out, and the new version will have its version number incremented<sup>c</sup>.



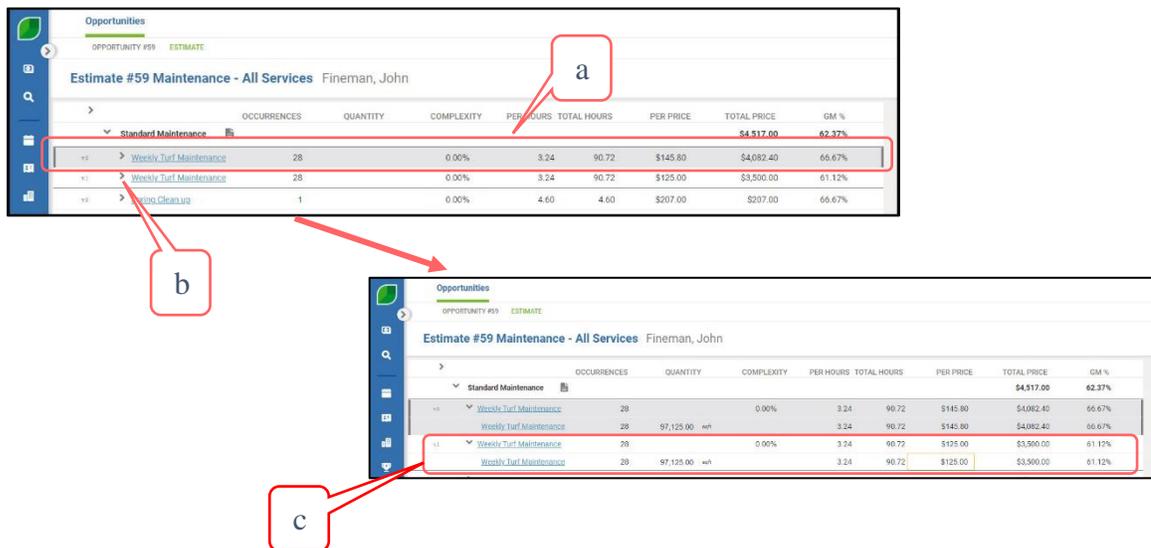
	OCCURRENCES	QUANTITY	COMPLEXITY	PER HOURS	TOTAL HOURS	PER PRICE	TOTAL PRICE	
Standard Maintenance							\$4,517.00	
v0 Weekly Turf Maintenance	28		0.00%	3.24	90.72	\$145.80	\$4,082.40	66.67%
Weekly Turf Maintenance	28	97,125.00 sqft		3.24	90.72	\$145.80	\$4,082.40	66.67%
v1 Weekly Turf Maintenance	28		0.00%	3.24	90.72	\$125.00	\$3,500.00	61.12%
Weekly Turf Maintenance	28	97,125.00 sqft		3.24	90.72	\$125.00	\$3,500.00	61.12%

#### 4. Changes to Existing Services

- a. If you entered changes to existing services, Aspire will apply them as follows.
  - i. **Increase Number of Occurrence** – If you increased the number of occurrences on any service for the contract, Aspire will add tickets based on the new number of occurrences. Aspire will set the Anticipated Start

Date of these newly created tickets to the *Anticipated Start Date* of the last previously existing ticket.

- ii. **Decrease Number of Occurrences** – If you decreased the number of occurrences for any service for the contract, Aspire will cancel the necessary number of open or scheduled tickets starting with the last ticket to bring the total occurrences in line with the new number of occurrences.
  - iii. **Price and Item Changes** – If you applied price changes to any service on the contract, then Aspire will change the price on all existing tickets beginning with the occurrence that you chose. Additionally, item changes (additions, quantity changes or prices) will be applied to the items for those tickets.
- b. In the *Estimate* screen after the change has been won, Aspire will continue to display the version of the service as it existed prior to the change, but the prior version will be grayed out as show in the following diagram<sup>a</sup>. Expanding the earlier version services (by clicking their gray pointer<sup>b</sup>) will still allow you to see the underlying items and kits<sup>c</sup> for the inactive version of the service.



If there is a prior active revision, the new revision will replace it, so Aspire will change that prior revision's status from *Active* to *Inactive*. Finally, Aspire will change the status of the new revision to *Active*.

## Payment Schedule for Changed Contracts

When a new contract estimate with a *Fixed Payment* invoice type is completed, Aspire requires you to establish a payment schedule that establishes billing records that Aspire will prompt you to bill in the Invoice Assistant at the appropriate time.

When you change a contract, Aspire requires you to update the payment schedule to reflect any changes to cost for ongoing customer payments. You update the payment schedule by clicking the *Edit Payment Schedule* icon (  ) at the bottom of the *Estimate* screen.

When you initiate winning of the contract changes<sup>a</sup>, after confirming that you wish to Win the changes<sup>b</sup>, if you have not already updated the payment schedule Aspire will automatically bring up the *Edit Payment Schedule* screen<sup>c</sup> so that you can specify the new payment schedule. When you save the changes by clicking the *Save* icon<sup>d</sup>, Aspire will complete the winning of the contract changes. If you do not save the payment schedule, but instead click the *Cancel* icon<sup>e</sup>, Aspire will not complete the winning of the changes and the changes will still be pending.

The image shows three overlapping screenshots from the Aspire software interface:

- Top Screenshot (a):** The 'Estimate #59 Maintenance - All Services' screen. A red callout 'a' points to the 'Estimate' icon at the bottom right.
- Bottom Left Screenshot (c):** The 'Payment Schedule' screen for a 'Fixed Payment' contract. A red callout 'c' points to the 'Edit Payment Schedule' icon at the top left.
- Bottom Right Screenshot (b):** A 'Confirm' dialog box asking 'Are you sure you want to Win this Contract change?'. A red callout 'b' points to the 'CONFIRM' button.
- Bottom Left Screenshot (d):** The 'Payment Schedule' screen showing a table of monthly invoice amounts. A red callout 'd' points to the 'SAVE' button at the bottom right.
- Bottom Left Screenshot (e):** The 'Payment Schedule' screen showing a table of monthly invoice amounts. A red callout 'e' points to the 'CANCEL' button at the bottom right.

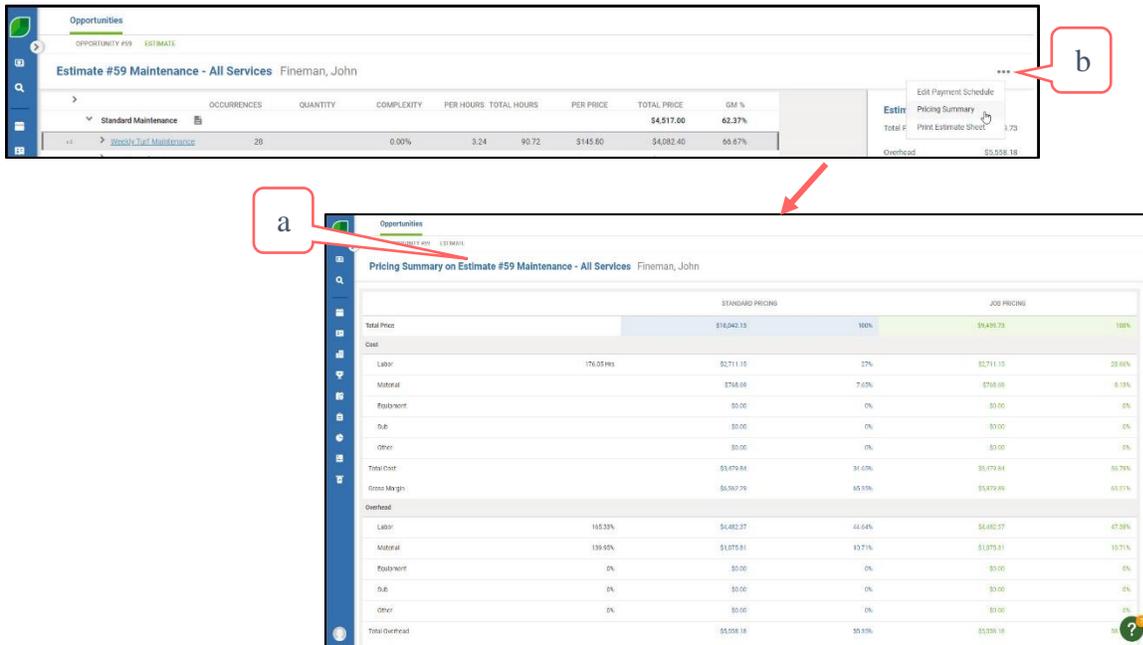
## Other Topics Related to Changed Contracts

### Renewing Contracts

When you renew a contract that has changes, the renewal is created based on the most recent revision of the contract. If, for example, you are renewing a contract that has a mowing service v.0 that was replaced by mowing service v.1, Aspire will apply the v.1 mowing service to the revision.

## Pricing Summary

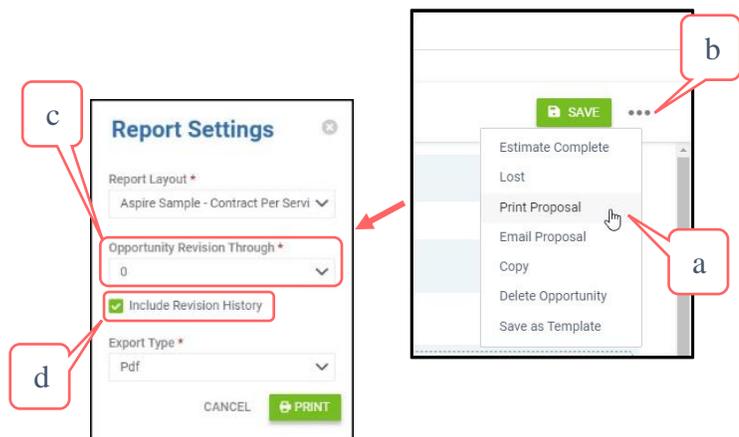
The *Pricing Summary*<sup>a</sup> is available by clicking the 3 dot icon<sup>b</sup> at the top of the *Estimate* screen and selecting Pricing Summary.



The *Pricing Summary* shows financial information for the contract as if changes have been applied. Thus deleted services or prior versions of new services are not included. This allows you to review expected cost and margin based on the new estimate.

## Printing Contracts

Contracts can be printed from the *Print Proposal* option<sup>a</sup> in the *Option* menu<sup>b</sup> at the bottom of the *Opportunity* screen. Two parameters have been added to the Report Settings dialog window to allow you to modify the proposal that the system generates:



### 1. Opportunity Revision

#### Through<sup>c</sup> – Allows you to

specify the revision upon which the generated proposal should be based. For example, specifying revision 2 indicates that the proposal should be based on the second revision.

2. **Include Revision History<sup>d</sup>** – Checkbox allows you to specify whether or not the generated proposal should include line items from versions of the contract prior to the revision indicated in the *Opportunity Revision Through* field.

## Conclusion

Aspire’s ability to streamline the contract change process will be a time saver.

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